

Statistics Weekly

Thursday, 9 September 1993



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statistics

MONTHLY RETAIL TURNOVER



Retail trade growth eases

The trend estimate of retail turnover for July 1993 indicated an easing in the growth rate after the moderate growth shown over the first half of 1993. The trend estimates had increased by 0.3 or 0.4 per cent per month from January to June, but the July estimate rose by only 0.1 per cent over June. The annual growth (July 1993 over July 1992) was 3.4 per cent, a monthly average growth of just under 0.3 per cent.

The grocery industry (the largest) reflected a similar pattern to the Australian trend with an easing of the growth rate. Hotels, liquor stores and licensed clubs has shown strong growth over the last six months. However, department stores are again in decline after a period of growth. Clothing and fabric stores showed weak to moderate growth while other food stores declined.

RETAIL AND SELECTED SERVICE INDUSTRIES TURNOVER

	Original value in July 1993 (\$m)	Average monthly percentage change in trend estimates	
		3 months ended July 1993	12 months ended July 1993
Grocers, confectioners, tobacconists	2,503	0.4	0.4
Butchers	212	-0.7	0.5
Other food stores	513	-0.3	-0.5
Total food group	3,228	0.2	0.2
Hotels, liquor stores, licensed clubs	988	0.9	0.4
Department and general stores	764	-0.7	0.1
Clothing and fabrics stores	570	0.2	0.2
Electrical goods stores	483	0.8	0.7
Pharmacies	404	1.9	1.8
Newsagents	252	-1.6	-0.5
Other industries	1,358	n.a.	n.a.
All industries	8,046	0.3	0.3

On a State basis, trend estimates of turnover for New South Wales have remained in decline virtually since July 1992 while Tasmania has been in decline for the first seven months of 1993. Western Australia is still showing strong growth while growth in Victoria and South Australia is moderate. Growth in Queensland and the Australian Capital Territory has eased during 1993 and both recorded zero growth in July.

RETAIL AND SELECTED SERVICE INDUSTRIES TURNOVER
Monthly percentage change in State trend estimates

	NSW	Vic.	Qld	SA	WA	Tas.	ACT	Aust.
1993								
March	0.0	0.8	0.2	0.5	1.1	-0.2	0.6	0.4
April	-0.1	0.9	0.2	0.6	1.5	-0.2	0.5	0.4
May	-0.3	0.8	0.2	0.6	1.5	-0.2	0.4	0.4
June	-0.4	0.7	0.2	0.6	1.4	-0.1	0.2	0.3
July	-0.6	0.4	0.0	0.5	1.0	-0.4	0.0	0.1

Yardsticks for business performance

The profits of medium-sized businesses between the years 1990-91 and 1991-92 were less affected by the recession than those of small and large businesses.

For all industries, total profits fell by 12 per cent in 1991-92 compared with the previous year. While the profits of large and small businesses declined by 10 and 22 per cent respectively, those of medium-sized businesses were down by just 7 per cent.

These are some of the broad trends to be found in the second annual issue of *Business Operations and Industry Performance, Australia* released last week.

The Australian Bureau of Statistics has incorporated a number of improvements into this publication, mostly in response to user suggestions following release of the first issue last year. Among other things, the format of the publication has changed to allow inter-year comparisons, a feature which is designed to assist the principal users of the data, such as individual businesses, financial analysts and economists.

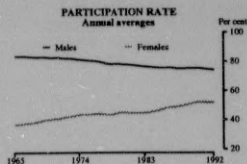
KEY FINANCIAL TRANSACTIONS
All selected industries

Item	1990-91 \$ million	1991-92 \$ million	Percentage change
Sales of goods and services	679,053	714,484	5
Less cost of sales	502,534	537,118	7
Trading profit	176,519	177,366	0
Earnings before interest and tax	140,542	120,382	-14
Less interest expenses	81,247	68,318	-16
Operating profit before tax	59,296	52,064	-12

The table (extracted from a more detailed table in the publication itself) suggests that non-trading items were responsible for the fall in total profits before tax in 1991-92. The main contributors were a 16 per cent fall in interest income, a 14 per cent rise in depreciation write-offs and a 3 per cent rise in labour costs.

Despite the decline in profits, a modest 1 per cent growth in total liabilities combined with declining interest rates enabled business generally to maintain or improve its performance in terms of debt and liquidity ratios.

The data, broken down into categories of industry and size of business, revealed considerable variation in the direction and extent of these movements across the categories of business.



Women in the labour force

(This is a shortened version of a special feature article published in *The Labour Force, Australia*, July 1993).

Women's participation in the labour force rose from 44.6 per cent in 1982 to 51.9 per cent in 1992. In contrast, the participation rate for males fell by 3.1 percentage points to 74.3 per cent over the same period.

In 1992, the participation rate for married females was 52.9 per cent, up from 42.2 per cent ten years earlier while the rate for unmarried females rose from 48.3 per cent to 50.5 per cent over the same period.

Unmarried females in the younger age groups generally have higher participation rates than married females in the same age groups. The difference is most marked in the 25 to 34 years age group, the principal child-bearing age group, where the participation rate for unmarried females was 76.6 per cent in 1992 compared with 61.2 per cent for married females.

While participation rates for most groups shown in the table below rose during the ten years to 1992, those for unmarried females aged 15 to 24 fell. Increased participation in tertiary education and higher school retention rates are factors in this decrease.

FEMALE PARTICIPATION RATES
Annual averages (per cent)

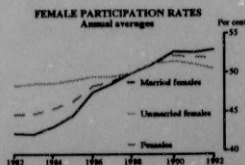
Age	Married		Unmarried		Total	
	1982	1992	1982	1992	1982	1992
15 to 19	43.0	59.8	60.4	55.7	59.6	55.8
20 to 24	55.3	67.1	82.0	80.2	70.9	76.3
25 to 34	48.0	61.2	71.4	76.6	53.4	65.8
35 to 44	57.5	70.7	63.5	73.0	58.5	71.1
45 to 54	47.7	63.4	55.4	67.0	49.3	64.2
55 and over	12.4	15.0	7.9	6.9	10.3	11.2
Total	42.2	52.9	48.3	50.5	44.6	51.9

Full-time and part-time employment

The proportion of women working part time (i.e. less than 35 hours per week) rose from 35 per cent of total female employment in 1982 to 42 per cent in 1992.

Full-time/part-time status of employed females varies markedly according to age. In 1992, 73 per cent of employed females in the 20 to 24 years age group were working full time while 64 per cent of employed females in the 25 to 34 years age group were working full time.

Among employed females aged 55 years and over, there has been a shift to part-time work in the last decade. In 1982, 44 per cent of employed females aged 55 years and over were employed part time. By 1992, the proportion had increased to 53 per cent.



There has also been an increase in the proportion of employed younger females who work part time. In 1982, 30 per cent of employed females aged 15 to 19 years and 17 per cent of employed females aged 20 to 24 years were working part time. By 1992, the proportions had increased to 65 per cent and 27 per cent respectively. Increased involvement in full-time education is a factor in these shifts.

EMPLOYED FEMALES
Annual averages ('000)

Age	Full-time		Part-time		Total	
	1982	1992	1982	1992	1982	1992
15 to 19	210.7	96.8	90.7	177.0	301.5	273.8
20 to 24	347.5	340.1	69.3	124.3	416.8	464.4
25 to 34	389.5	533.3	217.8	305.5	607.3	838.7
35 to 44	286.6	475.9	240.4	401.7	527.0	877.5
45 to 54	202.7	342.5	145.1	241.8	347.9	584.3
55 and over	87.7	94.6	69.3	108.4	157.0	203.0
Total	1,524.7	1,883.2	832.6	1,358.6	2,357.3	3,241.8

Unemployment

The female unemployment rate in 1982 was 8.5 per cent. The following year it rose to 10.4 per cent but then decreased each year to 6.9 per cent in 1989. In 1990, the rate began to increase and by 1992 it stood at 10.0 per cent. During this period, the number of females who were unemployed increased from 219,700 in 1982 to 360,500 in 1992. By comparison, the number of unemployed males increased from 275,200 in 1982 to 572,600 in 1992. The male unemployment rate was 6.4 per cent in 1982 compared with 11.4 per cent in 1992.

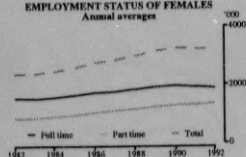
In 1992, the majority (73%) of unemployed females were looking for full-time work, although differences existed according to age. There have also been some marked changes over the last ten years for particular age groups.

In 1992, 77 per cent of unemployed women aged 45 to 54 years were looking for full-time work compared with 61 per cent ten years earlier. In contrast, an increasing proportion of younger unemployed females have been looking for part-time work. In 1982, 19 per cent of unemployed females aged 15 to 19 years were looking for part-time work. By 1992, the proportion had increased to 36 per cent.

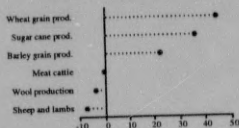
UNEMPLOYED FEMALES
Annual averages ('000)

Age	Looking for full-time work		Looking for part-time work		Total	
	1982	1992	1982	1992	1982	1992
15 to 19	60.8	55.2	14.2	30.6	75.0	85.8
20 to 24	39.7	62.4	7.5	12.4	47.2	74.8
25 to 34	30.6	63.8	18.1	24.3	48.7	88.1
35 to 44	17.6	45.9	11.7	19.5	29.3	65.4
45 to 54	9.4	29.5	6.0	8.9	15.4	38.4
55 and over	2.6	5.0	1.5	2.9	4.2	7.9
Total	160.8	261.9	58.9	98.5	219.7	360.5

EMPLOYMENT STATUS OF FEMALES
Annual averages



SELECTED AGRICULTURAL ITEMS
Percentage change 1992-93 on 1991-92



Mixed results in crops while livestock numbers decrease

Preliminary figures from the 1992-93 agricultural census show mixed results from crop farming compared with the previous year despite strong production gains by the major cereal crops.

- ☐ The area of wheat for grain rose by 1.0 million hectares (13.7%) to 8.2 million hectares, with production up by 4.7 million tonnes (44.7%) to 15.3 million tonnes.
- ☐ Barley increased in area by 0.2 million hectares (5.7%) to 2.9 million hectares and production increased by 1.0 million tonnes (22.7%) to 5.6 million tonnes.
- ☐ Oats decreased marginally in area to 1.1 million hectares. However production increased by 0.3 million tonnes (15.3%) to 1.9 million tonnes.
- ☐ Sunflower plantings decreased by 20,000 hectares (25.3%) to 0.1 million hectares.
- ☐ Canola/rapeseed plantings decreased by 43,000 hectares (28.5%) to 0.1 million hectares, although production increased marginally.
- ☐ Area of sugar cane cut for crushing decreased slightly. However production rose by 7.5 million tonnes (36.3%) to 28.1 million tonnes.
- ☐ Area of cotton fell by 0.1 million hectares (23.4%) to 0.2 million hectares.

With the exception of milk cattle, the major categories of livestock recorded a decline in numbers in the year to March 1993, and the wool industry recorded another reduction in production — but not nearly as large a fall as in the previous year.

- ☐ The number of sheep and lambs at 31 March 1993 was 136.7 million, a fall of 7.8 per cent from March 1992 following a fall of similar magnitude in the previous twelve months.
- ☐ The number of sheep and lambs shorn fell by 12.7 million (7.6%) to 153.7 million.
- ☐ Wool production fell by 32,000 tonnes (4.3%) to 704,000 tonnes.
- ☐ Total cattle and calves at 31 March 1993 was 23.7 million, a fall of 0.6 per cent compared with the number at 31 March 1992.
- ☐ Pig numbers also fell slightly, but total poultry numbers rose by about 12 per cent to reach 70,226 at March 1993.

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Order from the following:

Expected releases over the fortnight to 21 September

- 8** Building Activity, Australia: Dwelling Unit Commencements, June Quarter 1993, Preliminary (8750.0; \$10.70)
- 9** The Labour Force, Australia, August 1993, Preliminary (6202.0; \$10.70)
- 15** Price Index of Materials Used in Building Other Than House Building, Eight Capital Cities, July 1993 (6407.0; \$10.70)
Price Index of Materials Used in House Building, Six State Capital Cities and Canberra, July 1993 (6408.0; \$8.20)
- 16** Housing Finance for Owner Occupation, Australia, July 1993 (5609.0; \$10.70)
- 17** Export Price Index, Australia, July 1993 (6405.0; \$8.20)
- 21** Price Indexes of materials Used in Manufacturing Industries, Australia, July 1993 (6411.0; \$10.70)
Import Price Index, Australia, July 1993 (6414.0; \$8.20)

Selected releases: 1 to 7 September

General

- Publications Issued in August 1993 (1102.0; free over the counter)
- Australian Standard Classification of Occupations (ASCO) — Manual Coding System: Occupation Level, 1993 (1227.0; \$30.60) — *new issue*
- Australian Economic Indicators, September 1993 (1350.0; \$26.00)
- Economic Indicators, NSW, August 1993 (1307.1; \$5.60)
- Economic Indicators, Vic., August 1993 (1307.2; \$6.60)
- Western Australian Year Book, 1993 (1300.5; \$26.50)

Demography

- Overseas Arrivals and Departures, Aust., March Qtr 1993 (3402.0; \$14.30)

Social statistics

- Aborigines in WA, 1991 (4107.5; \$20.00)

National accounts, Finance and Foreign trade

- Foreign Trade, Aust.: Merchandise Imports, July 1993 (5433.0; \$9.70)

Agriculture

- Summary of Crops, Aust., 1991–92 (7330.0; \$27.50)

Manufacturing, Mining, Energy, Service industries, Building and Construction

- Manufacturing Production, Aust.: Household Appliances and Electrical Equipment, June 1993 (8357.0; \$9.00)
- Dwelling Unit Commencements Reported by Approving Authorities, Vic., June 1993 (8741.2; \$10.70)
- Building Approvals, WA, July 1993 (8731.5; \$10.70)
- Dwelling Unit Commencements Reported by Approving Authorities, SA, June 1993 (8741.4; \$10.70)
- Tourist Accommodation, NT, June Qtr 1993 (8635.7; \$12.00)

Transport

- Motor Vehicle Registrations, WA, July 1993 (9303.5; \$7.60)

Key national indicators	Period	Units	Latest figure available		Percentage change (a) on	
			Original	Seasonally adjusted	Previous period	Corresponding period last year
National accounts						
Gross domestic product (GDP(A)) at 1989-90 prices	June qtr 93	\$m	n.a.	95,250	1.2	3.3
International accounts						
Balance on current account (b)	July 93	\$m	-1,548	-1,099	26	26
Balance on merchandise trade (b)	"	"	-180	144	—	—
Balance on goods and services (b)	"	"	-469	20	—	—
Merchandise exports	"	"	5,897	5,395	7	13
Merchandise imports	"	"	-5,577	-5,251	1	10
Net foreign debt	30 June 93	\$m	172,325	n.a.	7.5	12.9
Net foreign liabilities	"	"	222,984	n.a.	7.2	12.2
Consumption and investment						
Retail turnover at current prices	July 93	\$m	8,046	8,194	0.2	3.6
New capital expenditure at 1989-90 prices	June qtr 93	"	6,034	5,788	-2.8	1.8
New motor vehicle registrations	July 93	no.	45,464	43,743	-9.3	0.6
Production						
Manufacturers' sales at 1989-90 prices	Mar. qtr 93	\$m	31,512	33,677	1.1	2.3
Dwelling unit approvals	July 93	no.	15,738	15,200	8.2	10.7
Building approvals	"	\$m	2,080	2,097	4.1	14.3
Building work done at 1989-90 prices	Mar. qtr 93	"	5,748	6,207	0.8	6.9
Prices						
Consumer price index	June qtr 93	1989-90 = 100.0	109.3	n.a.	0.4	1.9
Articles produced by manufacturing industry	June 93	1988-89 = 100.0	115.3	n.a.	0.5	2.3
Materials used in manufacturing industries	June 93	1984-85 = 100.0	127.2	n.a.	1.5	2.1
Labour force and demography						
Employed persons (d)	July 93	'000	7,745.2	7,735.1	0.0	0.0
Participation rate † (d)	"	%	62.3	62.4	-0.4	-1.0
Unemployment rate † (d)	"	%	10.4	10.7	-0.4	-0.3
Job vacancies	May 93	'000	30.2	31.6	9.5	24.3
Average weekly overtime per employee	"	hours	1.18	1.20	3.5	8.4
Estimated resident population	Dec. qtr 92	million	17.6	n.a.	0.2	1.1
Short-term overseas visitor arrivals	June 93	'000	205	247	-6.4	14.3
Incomes						
Company profits before income tax	June qtr 93	\$m	3,978	4,435	-1.8	33.6
Av. weekly earnings, full-time adults; ordinary time	May qtr 93	\$	597.80	n.a.	0.7	1.8
Financial markets						
Interest rates (c) (monthly average)						
90-day bank bills †	July 93	% per annum	4.95	n.a.	-0.30	-0.60
10-year Treasury bonds †	July 93	"	6.90	n.a.	-0.45	-1.40
Exchange rate — \$US	July 93	per \$A	0.6775	n.a.	—	—

(a) Based on seasonally adjusted figures where available. (b) For percentage changes, a minus sign indicates an increase in the deficit; no sign means a decrease in the deficit or an increase in the surplus. (c) Source: Reserve Bank of Australia. (d) Later figures expected to be released Thursday, 9 September 1993.
 NOTES: † = change is shown in terms of percentage points. n.a. = not available.

Percentage change from same period previous year

Key State indicators

	Period	NSW	Vic.	Qld	SA	WA	Tas.	NT	ACT	Aust.
New capital expenditure*	Mar. qtr 93	6.6	2.7	-14.0	2.2	31.5	1.0	n.a.	n.a.	3.2
Retail turnover (trend estimate)	July 93	-2.0	5.8	4.5	3.5	12.3	0.0	n.a.	7.8	3.4
New motor vehicle registrations†	July 93	-8.6	4.5	15.9	-4.1	-2.6	-5.9	36.2	6.8	0.6
Number of dwelling unit approvals*	July 93	12.3	4.9	24.5	21.3	2.9	8.0	12.9	-12.5	8.3
Value of total building work done	Mar. qtr 93	3.2	2.0	16.0	0.8	35.9	-0.5	-10.8	-6.2	7.5
Employed persons*	July 93	-1.7	-1.3	2.3	1.4	3.6	0.2	-3.0	4.4	0.0
Capital city consumer price index	June qtr 93	1.8	1.8	2.5	2.7	1.1	2.2	1.5	2.2	1.9
Av. weekly earnings (full-time adult ordinary time)	May qtr 93	0.1	2.2	5.0	1.7	-0.1	2.0	2.5	4.2	1.8
Population	Dec. qtr 92	0.9	0.5	2.5	0.5	1.2	0.5	1.0	1.5	1.1
Room nights in licensed hotels and motels, etc.	Mar. qtr 93	6.7	2.3	14.1	-2.5	2.1	10.5	6.1	14.6	7.0

* Seasonally adjusted except for NT and ACT. † Seasonally adjusted except for Tas., NT and ACT.
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